

**Pre-Proposal Conference for the
Developmental Disabilities Administration,
Utilization Review and Authorization of Services,
RFP, OPASS # 14-1960**

March 20, 2013

Parties Present:

Cathy Carter

Michelle Ferges

Nancy Hatch

Darlene Abraham

Respondents to the Conference

Transcribed By: Always On Time

1 STATE OF MARYLAND

2 DEPARTMENT OF MENTAL HEALTH AND HYGIENE

3 March 20, 2013

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5 CATHY CARTER: This is the pre-proposal conference
6 for the Developmental Disabilities Administration, Utilization
7 Review and Authorization of Services, RFP, OPASS # 14-10960.
8 Today's date is March 20, 2013 and its 2:00pm. My name is Cathy
9 Carter and I'm with the Office of Procurement and Support
10 Services and I'm here to go over the process for this
11 procurement. I think everybody here has already signed the sign
12 in sheet and before you leave, if you have a business card, we
13 also ask that you drop it in the red basket on your way out the
14 door. The Department of Health and Mental Hygiene, Developmental
15 Disabilities Administration is seeking a contractor to conduct,
16 on a state-wide basis, authorization for Request for Service
17 Change, to conduct a review of high utilization services and
18 utilization review of existing services as described in the scope
19 of work, which is Section 3 of your RFP. Minutes are being taken
20 of this meeting and will be distributed to everybody in
21 attendance and to everybody who has received a copy of the
22 proposal. If you decide not to submit a proposal, we ask that
23 you fill out the vendor's feedback response, which is page ii in
24 the RFP and send it back to us so we'll know how to plan for
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1 future procurements.

2 Subsequent to this pre-proposal conference, written
3 questions will be accepted until there is insufficient time to do
4 so before the due date. Also, questions and answers will be
5 distributed to all vendors who have received a copy of the
6 proposals. Questions and answers, as well as the minutes of this
7 pre-proposal, will be posted on eMaryland Marketplace and the
8 DHMH website. Please remember that in order to receive an award,
9 you must be registered on eMaryland Marketplace. Registration is
10 free and easy. Please check under Subsection 1.8, for details.

11 Questions should be submitted no later than five days prior
12 to the proposal due date. The Procurement Officer, based on the
13 availability of time and research to answer your questions shall
14 decide whether the question can be answered in a timely manner,
15 so please try to get any subsequent questions in as soon as
16 possible.

17 This contract will be for three years, beginning on or
18 about July 1, 2013 and there are no option renewals associated
19 with this. The procurement method for this solicitation is what
20 we call competitive sealed proposals and that's where you submit
21 your proposal in two volumes. Volume 1 is the technical
22 proposal. Volume 2, is your financial proposal. Both need to be
23 in separately sealed envelopes. Each envelope shall bear the RFP
24 Title and Number, name and address of the offeror. The closing
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1 date and time for receipt of the proposal. Pages of both volumes
2 shall be consecutively numbered and the general format for this
3 proposal is Section IV, Proposal Format in the RFP.

4 A brief transmittal letter prepared on the offeror's
5 letterhead and signed by someone who is authorized to commit the
6 offer to the services and requirements of the offer is requested.
7 Please be sure to include your social security number, your
8 federal ID number, acknowledgment of any addendum, If any. And,
9 also, please include your email address.

10 Subsection 4.4 lists all of the documents and information
11 required to be submitted with your technical proposal. We ask
12 that you please give special attention to Subsection 4.4.2, which
13 lists any additional requirements needed in your technical
14 submission. A 5% MBE and a 0.5% VSBE goal have been established
15 for this contract. Do we have any certified MBEs? Any VSBEs?
16 We'll give you an opportunity as we go around to introduce
17 yourself and make yourself known a little bit later.

18 Be sure to complete the Certified MBE Utilization and Fair
19 Solicitation Affidavit which is attached as D-1. Also,
20 attachment L-1, which is the VSBE Utilization Affidavit. They
21 must be completed. These attachments must be in separately
22 sealed envelopes and labeled. If an offeror fails to submit
23 Attachment D-1 and Attachment L-1 with the offer as required, the
24 Procurement Officer shall deem the proposal non-responsive and
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1 shall determine that the offer is not reasonably susceptible of
2 being selected for the award.

3 Your technical proposal should consist of one unbound
4 original, four copies, one electronic version in Microsoft Word
5 format and the second electronic version in searchable PDF format
6 for public information requests. That copy shall be redacted so
7 that all your confidential and private information is excluded.

8 Within five days of being notified of this recommendation
9 for award, the offeror must submit the Contract Affidavit as set
10 forth in Attachment C. If there is a question of who your
11 Resident Agent is, we ask that you contact the State's Corporate
12 Charter Division at 401-767-1330. The office is located downtown,
13 at 301 Preston Street.

14 Volume II, your financial proposal shall contain all price
15 information in the format specified in Attachment F. The number
16 of copies for this Volume is one unbound original, four copies
17 and one electronic version in Microsoft Word format.

18 Your proposals will be evaluated by a committee organized
19 just for that purpose, the evaluation criteria and selection
20 procedure is in Section 5 of your RFP. The Technical criteria is
21 listed in descending order of importance and the financial
22 criteria is listed in Subsection 5.3.

23 As noted in Subsection 5.5, under Selection Procedure. The
24 contract will be awarded to the responsible offeror that
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1 submitted the proposal determined to be the most advantageous to
2 the State considering technical evaluation factors and the price
3 factors, as set forth in the RFP. Unsuccessful offerors will
4 have the chance to request a debriefing if they would like to
5 have one.

6 It's also very important that you get your proposals to us,
7 by the due date and time which is Monday, April 1, 2013 at
8 2:00pm. No proposals will be accepted that. The address for
9 receipt of proposal is listed on the Key Information Summary
10 Sheet in the RFP. There are three acceptable means of delivery;
11 US Postal Service, you may hand deliver it yourself, but please
12 ask for a receipt, or you can use a commercial courier and
13 please, get a receipt for that also.

14 Now the program, the Developmental Disability
15 Administration will introduce themselves and give an overview of
16 the project and we'll go around the room and you can introduce
17 yourselves. And, for the record, if you have any questions,
18 please state your name before asking your question.

19 MICHELLE FERGES: Good afternoon, my name is Michelle
20 Ferges. I am the Acting Chief of Procurement for the
21 Developmental Disabilities Administration. For this procurement,
22 I will be acting as Procurement Coordinator. I have Ms. Darlene
23 Abraham from Developmental Disabilities, she will be providing
24 administrative support today and to my right, I have Ms. Nancy
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1 HATCH. She is the State-wide Coordinator of Quality Monitoring.
2 For this procurement, she will act as Contract Monitor. Now, I'm
3 going to turn it over to Ms. Nancy, to give an overview of the
4 procurement and open for questions.

5 NANCY HATCH. I just want to talk real quick, just an
6 overview. There are two separate services in the contract. The
7 purpose of the Developmental Disabilities Administration
8 Performance Audit is to establish a more accurate accounting of
9 services provided for the individuals we serve. The Performance
10 Audits consist of reviewing documents to justify that the service
11 was rendered and the licensee support hours were utilized as
12 projected in the Service Funding Plan and the Individual Plan,
13 based on the level and ratio of supervision and required
14 services. There's also an interview with the person receiving
15 services to determine whether or not services were rendered as
16 estimated. And then, the authorization of services is based on
17 Medicaid law. Individuals receiving at least one waiver covered
18 service have a right to access the full range of waiver services
19 and individual outcomes and needs of these services can change,
20 resulting in changes to the individual plan and then there's a
21 need for a Request for Service Change. There could be an
22 increase in services, a decrease, an addition of new services or
23 resources. And, any questions that you may have today, I'll try
24 to answer if I can and if not, I'll take them back with me and
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1 I'll get back to everyone that has questions. So, any questions?

2 CATHY CARTER: Let's go around the room and introduce
3 ourselves please, and if anybody has any questions, they can feel
4 free to ask.

5 LEN ZOCAR: My name is Len Zocar, I'm with the
6 Vision Healthcare Services.

7 RESPONDENT: I'm Kristin, I'm also with Vision
8 Healthcare Services.

9 KEVIN MCKELLY: Kevin McKelly at APS Healthcare.

10 WILLIAM COPEN: William Copen, Copen LLC

11 JOHN DWIDDLE: John Dwiddle

12 TERRY MCMURRAY: Terry McMurray

13 NORM VERNELL: Norm Grinnell

14 CATHY CARTER: Okay, first question.

15 MICHELLE FERGES: We did receive some questions by
16 email. I don't know if we have the time, opportunity to-
17 [crosstalk]

18 NANCY HATCH: These are from APS Healthcare.

19 MICHELLE FERGUS: Would you like those questions
20 answered today or-

21 KM: Sure.

22 CATHY CARTER: And we will also post them on
23 eMaryland Marketplace where everybody [crosstalk]

24 NANCY HATCH: I have answers to some of them. So,
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1 I'll read the question so everybody can hear and then the answer.
2 One of the questions was--well, first of all, on the DDA website,
3 there's an overview of the request for service change, the
4 process. And, one question was, are these reviews currently
5 conducted, the review of the services currently conducted by the
6 State, if not, please identify the contractor. They are not
7 currently being reviewed. We currently have Request for Service
8 Change, they're just not being reviewed.

9 And, how do providers submit request for review? In the
10 written form and I'm finding out if it's by fax, hard copy, mail
11 or electronically but it is--it does have to be a written request.

12 The other question was please provide an estimate and the
13 amount of time required for Request for Service Change and Add-On
14 Reviews. After there is a request for a Team Meeting to update
15 to the individual Plan, there's the Request for Service Change
16 Form is completed, submitted in written form to the Regional
17 Office within 20 days of the meeting. Then, the Regional Office
18 makes a decision within 45 days of a written requested being
19 received. And there will be--45 days or sooner, the receipt and
20 then there's a written response back and you'll either or the
21 person will either receive an approval, a denial or a request for
22 additional information, a combination of these based on a number
23 of requests submitted, which answers another part of the
24 question.

1 So, does the State negotiation modifications of requests
2 and approve fewer services than requested and if so, are there
3 partial denials and susceptible for appeal? So, if there's a
4 combination of either approval, denial, additional information,
5 however it works, all denials will include information about your
6 right--their right to appeal and the decision on how to request
7 it. So, it can be split. Some services may be approved, some
8 may be denied.

9 And, does DDA investigate Request for Service Changes to
10 evaluate if the initial IP was adequate and developed
11 appropriately? No, it's just to evaluate the need of further
12 services or change in services. The review that happens will
13 only be a previous higher utilize services. So, the higher
14 priced modifications.

15 Please provide additional information about the quarterly
16 sample of existing services. Is this review the same as the
17 audit specified? No, it's not the same as the audit. It's not
18 the same as Utilization Review Audit, in 3.4.1-B2. There is an
19 occasional need to have the services--or, the Request for Service
20 Change Reviewed, the services that are under that.

21 Section 3.1.4.1.B are all decisions in the Request for
22 Service Change process subject to appeal? Yes, you can appeal
23 any decision that has been made.

24 Does this item require the contract to complete on-demand
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1 audits within 30 days of the request from the Department? Yes.

2 That was from Section 3.4.2.F.

3 Noted that Attachment R is actually the Request for Service
4 Change. It is noted that it says Attachment 2, but it's really
5 Attachment R.

6 Are verbal notifications of emergency requests followed by
7 notification in writing? Well, the emergency request only comes
8 from a person that's in a crisis situation and so, that verbal
9 notification goes to the Resource Coordinator if they have one,
10 and then that person, the Resource Coordinator, or family member,
11 they still have to provide the written Request for Service
12 Change. So, that would follow. I mean, so-but the verbal part
13 of it is only about getting somebody to help them with the Form.
14 It's not a verbal request for a service change, it's still a
15 written form.

16 The PCIS-2 Information, I'll send to you. I'll provide you
17 further information for that. That was just a request for point
18 of contact, so it can be reflected in the process.

19 And, any other questions that were in this email will be
20 answered-I'll send it out in the process.

21 RESPONDENT: Is the financial only allowed one
22 contract for the entire state or do you send [inaudible]

23 NANCY HATCH: Well, the Utilization Review and
24 Authorization of Services will be awarded as one contract.

1 Right.

2 CATHY CARTER: Any other questions?

3 CATHY CARTER: That's all the questions?

4 CATHY CARTER: Well, if you're sure there's no other
5 questions. Feel free to submit any questions, after today, but
6 just make sure you get them in on time so that we can prepare and
7 answer and get them out to everybody. We appreciate you coming
8 out and participating in this procurement process.

9 End of meeting

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